

***ARLINGTON PUBLIC SCHOOLS***

*In accordance with the provisions of the Massachusetts General laws, Chapter 30A, Section 20, notice is hereby given for the following meeting of the:*

***Arlington School Committee  
Standing Subcommittee: Superintendent Search Process Committee  
Wednesday, January 15, 2020  
5:15 PM***

*Arlington High School  
School Committee Room - Sixth Floor  
869 Massachusetts Avenue  
Arlington, MA 02476*

*Open Meeting*

*Public Participation*

*Approval of Minutes - October 28, 2019*

*Approval of Minutes - December 19, 2019*

*Discuss, Revise and Approve RFP for Superintendent Search Consultant*

*Adjourn*

*The listings of matters are those reasonably anticipated by the Chair, which may be discussed at the meeting. Not all items listed may in fact be discussed and other items not listed may also be brought up for discussion to the extent permitted by law.*

*Stated times and time amounts, listed in parenthesis, are the estimated amount of time for that particular agenda item. Actual times may be shorter or longer depending on the time needed to fully explore the topic.*

*Submitted By: Paul Schlichtman, Chair of the Superintendent Search Subcommittee*



## **Town of Arlington, Massachusetts**

---

### **Meeting Location**

#### **Summary:**

Arlington High School  
School Committee Room - Sixth Floor  
869 Massachusetts Avenue  
Arlington, MA 02476



---

## Town of Arlington, Massachusetts

**Open Meeting**



---

## **Town of Arlington, Massachusetts**

### **Public Participation**



## **Town of Arlington, Massachusetts**

---

### **Approval of Minutes - October 28, 2019**

#### **ATTACHMENTS:**

	Type	File Name	Description
▣	Reference Material	Superintendent_Search_Process_Committee_102819.pdf	102819 Minutes-Superintendent Search Subcommittee

*Arlington School Committee  
Superintendent Search Process Subcommittee  
Monday, October 28, 2019  
5:00 p.m.*

*Arlington High School School Committee Room 869 Massachusetts Avenue, 6th  
Floor Arlington, MA*

## **DRAFT MINUTES**

The meeting was called to order at 5:00 p.m.

Present: Paul Schlichtman, subcommittee chair  
Jennifer Susse, subcommittee member

Mr. Schlichtman noted that Dr. Allison-Ampe was absent, as she broke her wrist in a cycling accident.

Mr. Schlichtman presented some RFPs used by other districts to solicit a superintendent search firm.

The subcommittee discussed a timeline for preparing a RFP for the selection of a superintendent search consulting firm, for the purpose of conducting a search for a new superintendent.

The discussion focused on the need to provide community input in the search process, and to enter the marketplace at the most advantageous time in order to have a new superintendent in place for July 1, 2021.

If it is the goal of the school committee to enter the marketplace and advertise for candidates in September, 2020, it would be necessary for the consultant to conduct focus groups and gather community input in May and/or June, 2020.

The subcommittee discussed the desirability of establishing a timeline resulting in the selection of a consultant in March, which would require publishing an RFP in February.

The subcommittee discussed some of the stakeholders that should be included in outreach by the consultant, and should be reflected in the RFP:

- Teachers
- Parents (including subgroups)
- Administrators
- Finance Committee
- Select Board

- Town Moderator & Town Manager
- Town Meeting Members
- Rainbow LGBTQ
- Diversity Task Group
- Superintendent's Diversity Advisory Committee

The subcommittee discussed the need to have opportunities for participation during the day, evenings, and weekends.

The committee agreed to request a meeting with MASC Executive Director Glenn Koocher, to refine the timeline for proceeding with the initial stages of the search process.

On a **motion** by Ms. Susse, **seconded** by Mr. Schlichtman, it was **voted** to adjourn at 5:55 p.m.



## **Town of Arlington, Massachusetts**

---

### **Approval of Minutes - December 19, 2019**

#### **ATTACHMENTS:**

Type	File Name	Description
▣ Reference Material	Superintendent_Search_Process_Committee_121919.pdf	121919 Minutes-Superintendent Search Subcommittee



*Arlington School Committee  
Superintendent Search Process Subcommittee  
Thursday, December 19, 2019  
5:00 p.m.*

*Arlington High School School Committee Room 869 Massachusetts Avenue, 6th  
Floor Arlington, MA*

## **DRAFT MINUTES**

Present: Paul Schlichtman, subcommittee chair

Subcommittee members Jennifer Susse (arrived at 5:25), Kirsi Allison-Ampe

School committee members Bill Hayner, Len Kardon

Glenn Koocher, Executive Director, Massachusetts Association of School Committees

The meeting was called to order at 5:05 p.m.

The meeting was called to discuss elements the subcommittee wishes to see in the Requests for Proposals (RFP) to solicit bids by search firms. Mr. Koocher described the services school committees usually request of a search consultant:

- Facilitation of focus groups
- Analysis of feedback from the community
- Develop and execute online surveys,
- Develop decision criteria
- Develop a position description appropriate for the community

The subcommittee discussed its proposed timeline with Mr. Koocher. The committee expressed its desire to open the posting around Labor Day, and to close the submission date in October. The committee wishes to hire a search consultant by the end of March, and to vote to hire a new superintendent by the end of December.

In discussing RFPs, Mr. Koocher cited the Brookline document to be exemplary in terms of defining its expectations, but the bidding process was onerous. He said that complicated requirements for submitting a bid discourages potential bidders, and said we should keep the bidding requirements to a minimum. He said the committee could prepare separate cost proposals (menu format) or an all-inclusive cost proposal.

Mr. Koocher said the search process should be conducted so that community and staff input (focus groups, meetings, surveys) should allow stakeholders to respond anonymously. Individuals should be able to comment without having to expose themselves, and that a consultant should be able to put comments on chart paper on the wall, and flush out consensus that will be the foundation of a community profile and traits desired in a new superintendent.

Mr. Koocher strongly recommended that 2 or 3 school committee members should serve on the search committee, as the search belongs to the school committee and the school committee is held accountable for the outcome.

On a motion by Dr. Allison-Ampe, seconded by Dr. Susse, it was voted that the chair should draft a message to Michael Mason, or his designee, telling him what we would like to include in the RFP and make an initial draft. The committee further requests that a draft RFP should be returned to subcommittee no later than January 13, 2020. (3-0)

On a motion by Dr. Susse, seconded by Dr. Allison-Ampe, it voted to adjourn at 5:52 p.m. (3-0)



## **Town of Arlington, Massachusetts**

---

### **Discuss, Revise and Approve RFP for Superintendent Search Consultant**

#### **ATTACHMENTS:**

Type	File Name	Description
▣ Reference Material	Superintendent_Search_RFP-1.pdf	Superintendent Search RFP
▣ Reference Material	Superintendent_Search_Process_Subcommittee_011520-1.pdf	Supt Search Subcommittee Minutes

**ARLINGTON PUBLIC SCHOOLS  
RFP #20-XX  
REQUEST FOR PROPOSAL**

The Arlington School Committee is seeking proposals from qualified individuals and firms for professional services for the following:

**SUPERINTENDENT SEARCH/CONSULTING SERVICES**

Firms must have experience in performing public sector executive searches. The selected firm will have such duties as updating a position profile, developing a compensation and benefits range, applicant outreach, applicant screening, and interviewing candidates.

Proposals are invited and must be received by the Chief Financial Officer, Arlington Public Schools, Massachusetts on or before **2:00 P.M., Thursday, February 6, 2020** at the Town Manager's Office/Purchasing Department, Town Hall Annex, 730 Massachusetts Avenue, Arlington MA 02476.

Five (5) copies of technical proposal and one (1) digital copy on a USB drive shall be submitted in a separate sealed envelope marked **"RFP #20-XX Superintendent Search/Consulting Services – Technical Proposal"**, and One (1) copy of the price proposal in a sealed envelope marked **"RFP #20-XX Superintendent Search/Consulting Services Services – Price Proposal"**.

Proposals delivered after the appointed time and date will not be considered.

General information, proposal instructions, and the scope of work are available at the Town Manager's Office/Purchasing Department.

Further information relative to this proposal can be obtained by contacting Domenic R. Lanzillotti, Purchasing Officer at (781) 316-3003.

The Chief Financial Officer reserves the right to cancel any request for proposals, to reject in whole or in part any and all proposals when it is deemed in the best interest of Arlington Public Schools to do so.

ARLINGTON PUBLIC SCHOOLS  
Michael Mason  
Chief Financial Officer

January 23, 2020

## **SCOPE OF SERVICES**

The Arlington School Committee is seeking a collaborative executive search firm (Consultant) to work with the School Committee and the community in recruiting a new Superintendent of Schools. The contract will begin when approved by the School Committee.

Posting of the Superintendent position and the collection of applications shall begin no later than September 18, 2020, with a closing date no later than October 16, 2020, unless mutually agreed by the School Committee and the Consultant. The final School Committee vote to hire the Superintendent shall take place no later than December 17, 2020, unless mutually agreed by the School Committee and the Consultant. This contract will continue until all negotiations with the successful superintendent candidate are completed and the employment contract is signed.

### **1) Best Practices**

- a) The Consultant shall work collaboratively to support actions taken by the Arlington School Committee and/or a Superintendent Search Committee formed by the School Committee, and its representatives, in hiring our next public school superintendent.

### **2) Developing the Candidate Selection Criteria**

- a) The Consultant shall assist the School Committee and/or the Superintendent Search Committee in defining the leadership needs of the district and in establishing selection criteria for a new superintendent by soliciting input from the School Committee, parents, staff, administration, Town officials, and the community through focus groups, interviews, and an online survey.
- b) If requested by the School Committee and/or the Superintendent Search Committee, the Consultant shall review the current job description for the position of Superintendent of Schools, and recommend revisions subject to School Committee approval.
- c) The Consultant shall organize, publicize, and facilitate at least four (4) and up to ten (10) focus groups to gather input on the type of leadership to be sought from the next Superintendent from all stakeholders in the community, including, but not limited to, school department employees, (including educators), elected and appointed town government officials, parents, students, community partners, and other interested residents of Arlington.
- d) The Consultant shall conduct at least three (3) and up to ten (10) individual or small group interviews with individuals specifically identified by the School Committee and/or the Superintendent Search Committee.
- e) The Consultant shall conduct an online survey approved by the School Committee and/or the Superintendent Search Committee to collect broad community input for those not able to attend or not invited to a specific focus group.

### **3) Search Process Management**

- a) The Consultant shall work collaboratively with the School Committee and/or Superintendent Search Committee to ensure that Arlington obtains the best candidate

to meet our community and district expectations and priorities, both for today and in the future.

b) Timeline:

- i) The Consultant shall work with the School Committee and/or Superintendent Search Committee to develop the Superintendent search schedule and timeline. (The timeline will be developed in the context of the Committee's parameters, in which the Superintendent position and the collection of applications shall begin no later than September 18, 2020, with a closing date no later than October 16, 2020, unless mutually agreed by the School Committee and the Consultant. The final School Committee vote to hire the Superintendent shall take place no later than December 17, 2020, unless mutually agreed by the School Committee and the Consultant.)
- ii) The Consultant shall recommend method of advertising including publication, frequency and duration, and coordinate advertising. Advertising costs are not to be included in the proposal price.
- iii) The Consultant shall develop application package including submission requirements and timelines.
- iv) The Consultant shall ensure the process is designed to attract a national pool of highly-qualified and diverse candidates.

#### **4) Communication**

- a) The Consultant shall work collaboratively with the School Committee and the Superintendent Search Committee throughout the process, and keep the School Committee and the Superintendent Search Committee informed about what is occurring at each stage of the search process.
- b) The Consultant shall meet with the School Committee and/or Superintendent Search Committee throughout the search and provide regular progress reports.
- c) The Consultant shall coordinate or provide the school district with an up-to-date and maintained website and, if requested by the School Committee and/or the Superintendent Search Committee, through social media, for community information and updates about the search process.
- d) The Consultant shall finalize for publication a written summary of the synthesis of communicated skills and experiences generated from focus group and community input. If requested by the School Committee and/or the Superintendent Search Committee, such summary will be communicated to potential candidates.
- e) Use of social media should be explained by the consultant in terms of how it will be used during the selection process.

#### **5) Recruitment Process**

- a) The Consultant shall ensure that the search process is transparent, thorough, and will engage as many stakeholders as feasibly possible in order to best represent and engage our diverse professional, parent, educator and resident community.
- b) The Consultant shall present findings to the School Committee of selection criteria recommendations from the data gathered. Document Development:
- c) The Consultant shall assist the School Committee and/or Superintendent Search Committee in developing descriptive documents for prospective applicants, including requirements, submissions, and timelines. Candidate Recruitment (minimum):

- d) The Consultant shall conduct direct and indirect search recruitment activities via networking and advertising publications in order to generate a national pool of high-quality, diverse applicants. A racially and demographically diverse candidate pool is required.
- e) The Consultant shall determine method of direct recruiting, including professional networks.

#### **6) Candidate Screening:**

- a) The Consultant shall prescreen and verify submitted application materials for completeness and to ensure that all candidates meet all requirements.
- b) After reviewing submitted applications, the Consultant shall determine with the School Committee the number of initial screening candidates (those invited for interviews with the screening committee) and the number of semi-finalists (those invited for interviews with the full School Committee).
- c) The Consultant shall verify credentials and conduct extensive reference checks of finalists to be advanced to full committee.

#### **7) Selection Process**

- a) The Consultant shall assist the School Committee, the Superintendent Search Committee candidate screenings and first-tier interviews.
- b) The Consultant shall assist the School Committee with the assembly of the Superintendent Search Committee and community members involved in the selection process. To fulfill this requirement, the Consultant shall:
  - i) assist in recruiting a diverse body of community members to participate in the selection process to the extent determined by the School Committee and/or the Superintendent Search Committee. The consultant shall prepare a report of aggregate demographic characteristics and other data pertaining to the pool of applicants who wish to serve on the Superintendent Search Committee.
  - ii) conduct an orientation and interview training of all persons (pertinent laws, regulations, and policies) participating in the selection process.
- c) The Consultant shall be responsible for all scheduling related to the work of the Superintendent Search Committee, and will ensure that their work is completed in a timely manner.
- d) The Consultant shall provide support for the Superintendent Search Committee. This will include reviewing candidate paperwork, assisting with the development of interview questions and a scoring rubric, conducting interviews, and identifying finalists who will be advanced to the full School Committee.

#### **8) Final Candidate Selection Process:**

- a) The Consultant shall assist the School Committee and/or the Superintendent Search Committee in the final selection process, including the determination of the appropriate number of candidates and the number of semi-finalists, along with any additional support the interview committee may need.
- b) The consultant shall arrange to begin finalist interviews no later than November 27, 2020, unless a different date is mutually agreed by the Consultant and the School Committee

- c) The consultant shall schedule candidate site visits and Arlington community introductions for the finalists
- d) The consultant shall manage interviews of finalists with the full School Committee. This will include reviewing candidates' paperwork, assisting with the development of interview questions, and a scoring rubric, and conducting interviews.
- e) The consultant shall manage reference checking and site visits to place of employment of finalists and of candidates to Arlington Public Schools.

**9) Candidate Negotiations and Employment Offer:**

- a) The consultant shall assist the School Committee in managing the preferred candidate offer, negotiation, and development of employment contract.
- b) The consultant shall provide recommendation for an appropriate compensation and benefit package based on market study, subject to School Committee approval.
- c) The School Committee will develop and negotiate contract of employment.

**10) Candidate Retention:**

- a) After the selected superintendent has the opportunity to become acclimated to his or her new position and if requested by the School Committee and/or the Superintendent Search Committee, the consultant shall provide a full day team building workshop (eight hours) with the superintendent, administrative team, and School Committee. The goal of this workshop shall be to define roles and build the foundation for an effective approach to school governance in the Arlington Public Schools.
- b) Travel expenses are not included as a separate allowable expense. Travel is considered overhead to the consultant.
- c) Advertising expenses will be funded by the district after School Committee approves the marketing plan.
- d) The search will be deemed complete upon a signed contract with a new Superintendent.

**11) Consultant Conditions:**

- a) Travel expenses are not included as a separate allowable expense. Travel is considered overhead to the consultant.
- b) Advertising expenses will be funded by the district after School Committee approves of marketing plan.
- c) The search will be deemed complete upon a signed contract with a new Superintendent.

If, after due consideration, the School Committee determines that it does not wish to appoint any of the candidates who have applied for the position, the Consultant must be willing to provide any assistance and aforementioned services with conducting a reopened search for Superintendent or Interim Superintendent.



## Evaluative Criteria for Selection of Vendor

### Minimum Evaluation Criteria

- a. The successful firm must demonstrate experience in providing executive recruitment/search for public sector employers, which may include municipalities, public authorities, or regional districts. Such experience should include at least three Superintendents or Executives of similar position in organizations with 500 or more employees. Please submit the names of organizations, including any and all municipalities for which this service has been provided. If possible, please provide a contact name for each municipality.
- b. Each proposal must provide all the services described under the Scope of Services.
- c. The firm must be available to execute this contract in time for a final vote to select no later than March 26, 2020
- d. The firm must be available to make a presentation and be interviewed at a scheduled meeting no earlier than February 24, 2020 and no later than March 12, 2020.

### Comparative Evaluation Criteria

#### *Years of Experience*

<b>Highly Advantageous</b>	The Firm has five (5) or more years experience in conducting successful executive searches with public school systems, other educational institutions, and other non-profit organizations, and during the past five (5) years has concluded at least three (3) successful searches for a School Superintendent in Massachusetts, one (1) of which must have been for a district of similar size and demographics as Arlington.
<b>Advantageous</b>	The Firm has at least three (3) years experience in successful executive search and hiring processes and has concluded at least two (2) successful executive search for Superintendents with Massachusetts public school systems.
<b>Not Advantageous</b>	The Firm has fewer than three (3) years experience in successful executive search and hiring processes and has concluded only one (1) successful executive searches for a Superintendent.
<b>Unacceptable</b>	The Firm has fewer than three (3) years experience in executive search and hiring processes and has not concluded any successful executive searches for a Superintendent.

#### *Technical Presentation/Proposed Plan*

<b>Highly Advantageous</b>	The proposal contains a clear and comprehensive plan that addresses all the objectives stated in the Scope of Service and Proposal Submission Requirements.
----------------------------	---

<b>Advantageous</b>	The proposal contains a clear plan that addresses most of the project objectives stated in the Scope of Service and Proposal Submission Requirements
<b>Not Advantageous</b>	The proposal does not contain a clear plan and may meet some of the project objectives stated in the Scope of Service and Proposal Submission Requirements.
<b>Unacceptable</b>	The proposal fails to meet the objectives stated in the Scope of Service and Proposal Submission Requirements.

#### *Recruitment Materials*

<b>Highly Advantageous</b>	The Firm includes samples of advertisements, brochures and other forms of candidate outreach from at least five (5) different Superintendent searches with the proposal, at least one (1) of which involves a Superintendent search in Massachusetts.
<b>Advantageous</b>	The Firm includes samples of advertisements, brochures and other forms of candidate outreach from at least three (3) different executive searches with the proposal, at least one (1) of which involves a Superintendent search.
<b>Not Advantageous</b>	The Firm includes three (3) or fewer samples of advertisements, brochures, and other forms of candidate outreach with the proposal, none of which involve a Superintendent search.
<b>Unacceptable</b>	The Firm does not include samples of advertisements, brochures or other forms of candidate outreach.

#### *Interview Presentation*

*(The Evaluation Committee may schedule interview with Firms)*

<b>Highly Advantageous</b>	Firm for this project was present, clearly stated a plan of action, demonstrated excellent communications skills, presented other personnel with experience and skills who will be assigned for the duration of this project, demonstrated awareness and understanding of the goals and objectives of the Arlington Public Schools, and successfully responded to all questions from the Evaluation Committee.
<b>Advantageous</b>	Firm for this project was present, outlined a plan of action, demonstrated excellent communication skills, presented other personnel with experience and skills who will be assigned for the duration of this project, demonstrated awareness and understanding of the goals and objectives of the Public Schools of Arlington, and successfully responded to most of the questions from the Evaluation Committee.
<b>Not Advantageous</b>	Firm for this project was present but did not present a plan of action, or was unable to communicate effectively, or presented other personnel who did not have the experience and skills to work on the project, did not demonstrate awareness and understanding of the goals and objectives of the Public Schools of Arlington, and/or would

**Unacceptable**

not be assigned for the duration of this project or did not successfully respond to questions from the Evaluation Committee.

Firm for this project was not present and did not present a plan of action, or was unable to communicate effectively, or presented other personnel who did not have the experience and skills to work on the project, demonstrated awareness and understanding of the goals and objectives of the Public Schools of Arlington, and/or would not be assigned for the duration of this project or did not successfully respond to questions from the Evaluation Committee.

## Submittal Requirements

Interested qualified firms must submit its response addressing the objectives scope and schedule described in this RFQ. Responses must include, at a minimum, each of the following:

Five (5) paper copies of the technical proposal and a USB drive with the technical proposal in searchable PDF format shall be submitted in a sealed envelope marked "RFP #20-XX Superintendent Search/Consulting Services – Technical Proposal"

In addition, the Technical Proposals must include:

1. Cover letter, including a profile introducing the firm, as well as the name, telephone number, and email address of the primary contact for the project.
2. General description of the firm/team's experience.
3. Description, with examples, of the firm/team's experience in working with municipalities to successfully implement design guidelines and a design review process.
4. A detailed work plan based on the scope of services for the proposed work, including the firm/team's general approach to such work, evidence of the firm/team's understanding of the goals and objectives of the project, and methodology for accomplishing the tasks as listed in this RFP.
5. An outline of the schedule for completion of tasks (timeline) as presented in the firm/team's approach to the scope of services.
6. Description of or resumes for the assigned staffs' experience, educational background, availability, and chain of responsibility, including the name and title of the principal and project manager assigned to the project, names of all subconsultants, and resumes of all personnel to be associated with the project.
7. At least three (3) references, including name, title, agency, address, description of project, project cost, and telephone number and the email address for clients with similar projects completed by the Consultant within the last five years (including dates).
8. Other pertinent information about the firm(s) that would aid the selection committee in making a selection.
9. Completed Required Forms.
10. Evidence of insurance coverage, including general and professional liability and Workers' Compensation insurance.

One (1) sealed Pricing Proposal should include:

1. Completed Price Proposal.
2. Estimated breakdown by task of professional service fees (including expenses), assigned project staff and hourly billing rates of all staff assigned to provide services (including any sub-consultants).

Proposals must clearly address all the submittal requirements; that is, the response should include a section addressing all of the minimum qualifications, the minimum submittal requirements, and each of the review criteria. The proposal will be reviewed based on each of these items and it will be to the benefit of the responder to clearly address each of the items. Where the requirements specify a minimum level of experience, indicate the dates of said experience.

**Arlington School Committee  
Superintendent Search Process Subcommittee  
Wednesday, January 15, 2020  
5:15 p.m.**

*Arlington High School School Committee Room 869 Massachusetts Avenue, 6th  
Floor Arlington, MA*

## **DRAFT MINUTES**

The meeting was called to order at 5:20 p.m.

Present: Paul Schlichtman, subcommittee chair  
Jennifer Susse, subcommittee member  
Kirsi Allison-Ampe, subcommittee member  
Bill Hayner, school committee member

### **Public Comment:**

None

On a **motion** by Dr. Susse, **seconded** by Mr. Schlichtman, it was **voted** to approve the minutes of October 28, 2019. (2-0-1) Dr. Allison-Ampe abstained.

On a **motion** by Dr. Susse, **seconded** by Dr. Allison-Ampe, it was **voted** to approve the minutes of October 28, 2019. (3-0)

The subcommittee examined the proposed Request for Proposals for a search consultant. The subcommittee examined the document, paragraph by paragraph, and made edits based on a consensus of the subcommittee members.

On a **motion** by Dr. Susse, **seconded** by Dr. Allison-Ampe, it was **voted** to approve the Request for Proposals, as amended. (3-0)

On a **motion** by Dr. Susse, **seconded** by Dr. Allison-Ampe, it was **voted** to adjourn at 7:07 p.m. (3-0)

## **Scope of Services**

The Arlington School Committee is seeking a collaborative executive search firm (Consultant) to work with the School Committee and the community in recruiting a new Superintendent of Schools. The contract will begin when approved by the School Committee.

Posting of the Superintendent position and the collection of applications shall begin no later than September 18, 2020, with a closing date no later than October 16, 2020, unless mutually agreed by the School Committee and the Consultant. The final School Committee vote to hire the Superintendent shall take place no later than December 17, 2020, unless mutually agreed by the School Committee and the Consultant. This contract will continue until all negotiations with the successful superintendent candidate are completed and the employment contract is signed.

## **Scope of Work - Overview**

### **1. Best practices:**

The Consultant shall work collaboratively to support actions taken by the Arlington School Committee and/or a Superintendent Search Committee formed by the School Committee, and its representatives, in hiring our next public school superintendent.

### **2. Developing the Candidate Selection Criteria:**

**a.** The Consultant shall assist the School Committee and/or the Superintendent Search Committee in defining the leadership needs of the district and in establishing selection criteria for a new superintendent by soliciting input from the School Committee, parents, staff, administration, Town officials, and the community through focus groups, interviews, and an online survey.

**b.** If requested by the School Committee and/or the Superintendent Search Committee, the Consultant shall review the current job description for the position of Superintendent of Schools, and recommend revisions subject to School Committee approval.

**c.** The Consultant shall organize, publicize, and facilitate at least five (5) and up to ten (10) focus groups to gather input on the type of leadership to be sought from the next Superintendent from all stakeholders in the community, including, but not limited to, school department employees (including educators), elected and appointed town government officials, parents, students, community partners, and other interested residents of Arlington.

- d.** The Consultant shall conduct at least five (5) and up to ten (10) individual or small group interviews with individuals specifically identified by the School Committee and/or the Superintendent Search Committee.
- e.** The Consultant shall conduct an online survey approved by the School Committee and/or the Superintendent Search Committee to collect broad community input for those not able to attend or not invited to a specific focus group.

### **3. Search Process Management:**

**a.** The Consultant shall work collaboratively with the School Committee and/or Superintendent Search Committee to ensure that Arlington obtains the best candidate to meet our community and district expectations and priorities, both for today and in the future.

**b.** Timeline:

- i.** The Consultant shall work with the School Committee and/or Superintendent Search Committee to develop the Superintendent search schedule and timeline. (The timeline will be developed in the context of the Committee's parameters, in which the Superintendent position and the collection of applications shall begin no later than September 18, 2020, with a closing date no later than October 16, 2020, unless mutually agreed by the School Committee and the Consultant. The final School Committee vote to hire the Superintendent shall take place no later than December 17, 2020, unless mutually agreed by the School Committee and the Consultant.)
- ii.** The Consultant shall recommend and coordinate advertising, including its publication, frequency, and duration. Advertising costs are not to be included in the proposal price.
- iii.** The Consultant shall develop the application package, including submission requirements and timelines.
- iv.** The Consultant shall ensure the process is designed to attract a national pool of highly-qualified and diverse candidates.

### **4. Communication**

**a.** The Consultant shall work collaboratively with the School Committee and the Superintendent Search Committee throughout the process, and keep the School Committee and the Superintendent Search Committee informed about what is occurring at each stage of the search process.

**b.** The Consultant shall meet with the School Committee and/or Superintendent Search Committee throughout the search and provide regular progress reports.

**c.** The Consultant shall coordinate or provide the school district with an up-to-date and maintained web page and, if requested by the School Committee and/or

the Superintendent Search Committee, communicate through social media any necessary community information and updates about the search process.

**d.** The Consultant shall finalize for publication a written summary of the synthesis of communicated skills and experiences generated from focus group and community input. If requested by the School Committee and/or the Superintendent Search Committee, such summary will be communicated to potential candidates.

**e.** The Consultant shall advise the School Committee and the Superintendent Search Committee regarding best practices pertaining to the use of social media during the selection process.

## **5. Recruitment Process**

**a.** The Consultant shall ensure that the search process is transparent, thorough, and will engage as many stakeholders as feasibly possible in order to best represent and engage our diverse professional, parent, educator, and resident community.

**b.** The Consultant shall present findings to the School Committee of selection criteria recommendations from the data gathered.

**c.** The Consultant shall assist the School Committee and/or Superintendent Search Committee in developing descriptive documents (i.e. brochures and electronic materials) for prospective applicants, including requirements, submissions, and timelines.

**d.** The Consultant shall conduct direct and indirect search recruitment activities via networking and advertising publications in order to generate a national pool of high-quality, diverse applicants. A racially and demographically diverse candidate pool is essential.

**e.** The Consultant shall determine methods of direct recruiting, including professional networks.

## **6. Candidate Screening:**

**a.** The Consultant shall prescreen and verify submitted application materials for completeness and to ensure that all candidates meet all requirements. The Consultant shall recommend a minimum number of candidates required for a viable search. The School Committee reserves the right to designate a School Committee member to review any and all applications.

**b.** After reviewing submitted applications, the Consultant shall determine with the School Committee and/or Superintendent Search Committee the number of initial screening candidates (those invited for interviews with the Superintendent Search Committee) and the number of finalists (those invited for interviews with the School Committee).

**c.** The Consultant shall verify credentials and conduct extensive reference checks of finalists prior to announcing the names of candidates to the community.



## **7. Selection Process**

- a.** The Consultant shall assist the School Committee and the Superintendent Search Committee through screenings and interviews.
- b.** The Consultant shall assist the School Committee with the assembly of the Superintendent Search Committee and community members involved in the selection process. To fulfill this requirement, the Consultant shall:
  - i. assist in recruiting a diverse body of community members to participate in the selection process to the extent determined by the School Committee and/or the Superintendent Search Committee. The consultant shall prepare a report of aggregate demographic characteristics and other data pertaining to the pool of applicants who wish to serve on the Superintendent Search Committee.
  - ii. conduct an orientation and interview training of all persons (pertinent laws, regulations, and policies) participating in the selection process.
- c.** The Consultant shall be responsible for all scheduling related to the work of the Superintendent Search Committee, and will ensure that their work is completed in a timely manner.
- d.** The Consultant shall provide support for the Superintendent Search Committee. This will include reviewing candidate paperwork, assisting with the development of interview questions and a scoring rubric, conducting interviews, and identifying finalists who will be advanced to the full School Committee.

## **8. Final Candidate Selection Process:**

- a.** The Consultant shall assist the School Committee and/or the Superintendent Search Committee in the final selection process, along with any additional support the Superintendent Search Committee may need.
- b.** The consultant shall arrange to begin finalist interviews no later than November 30, 2020, unless a different date is mutually agreed by the Consultant and the School Committee.
- c.** The consultant shall schedule candidate site visits and Arlington community introductions for the finalists.
- d.** The consultant shall manage interviews of finalists with the full School Committee. This will include reviewing candidates' paperwork, assisting with the development of interview questions and a scoring rubric, and conducting interviews.
- e.** The consultant shall manage reference checking and site visits to place of employment of finalists.

## **9. Candidate Negotiations and Employment Offer:**

- a.** The consultant shall assist the School Committee in managing the preferred candidate offer, negotiation, and development of employment contract.

- b.** The consultant shall provide recommendations to the School Committee for an appropriate compensation and benefit package, based on market study.
- c.** The School Committee will develop and negotiate the contract of employment.

#### **10. Candidate Retention:**

After the selected superintendent has the opportunity to become acclimated to his or her new position, and if requested by the School Committee and/or the Superintendent Search Committee, the consultant shall provide eight hours of team building workshop(s) with the superintendent, administrative team, and School Committee. The goal of this workshop shall be to define roles and build the foundation for an effective approach to school governance in the Arlington Public Schools.

#### **11. Consultant Conditions:**

- a.** Travel expenses are not included as a separate allowable expense. Travel is considered overhead to the consultant.
- b.** Advertising expenses will be funded by the district after the School Committee approves the marketing plan.
- c.** The search will be deemed complete upon a signed contract with a new Superintendent.

If, after due consideration, the School Committee determines that it does not wish to appoint any of the candidates who have applied for the position, the Consultant must be willing to provide any assistance and aforementioned services with conducting a reopened search for Superintendent or Interim Superintendent.

#### **Minimum Evaluation Criteria**

- a.** The Proposer must be available to execute this contract in time for a final vote to hire no later than March 26, 2020.
- b.** The Proposer is available to make a presentation and be interviewed at a scheduled meeting no earlier than February 24, 2020 and no later than March 12, 2020.

## **V. Comparative Evaluation Criteria**

### **1. Proposer's Experience**

**Highly Advantageous:** The Proposer has five (5) or more years experience in conducting successful executive searches with public school systems, other educational institutions, and other non-profit organizations, and during the past five (5) years has concluded at least three (3) successful searches for a School Superintendent in Massachusetts, one (1) of which must have been for a district of similar size and demographics as Arlington.

**Advantageous:** The Proposer has at least three (3) years experience in successful executive search and hiring processes and has concluded at least two (2) successful executive search for Superintendents with Massachusetts public school systems.

**Not Advantageous:** The Proposer has fewer than three (3) years experience in successful executive search and hiring processes and has concluded only one (1) successful executive searches for a Superintendent.

**Unacceptable:** The Proposer has fewer than three (3) years experience in executive search and hiring processes and has not concluded any successful executive searches for a Superintendent.

### **2. Evaluation of the Proposed Plan:**

**Highly Advantageous:** The proposal contains a clear and comprehensive plan that addresses all the objectives stated in the Scope of Service and Proposal Submission Requirements.

**Advantageous:** The proposal contains a clear plan that addresses most of the project objectives stated in the Scope of Service and Proposal Submission Requirements.

**Not Advantageous:** The proposal does not contain a clear plan.

**Unacceptable:** The proposal fails to meet the objectives stated in the Scope of Service and Proposal Submission Requirements.

### **3. Proposer's Recruitment Materials**

**Highly Advantageous:** The Proposer includes samples of advertisements, brochures and other forms of candidate outreach from at least five (5) different Superintendent searches with the proposal, at least one (1) of which involves a Superintendent search in Massachusetts.

**Advantageous:** The Proposer includes samples of advertisements, brochures and other forms of candidate outreach from at least three (3) different executive searches with the proposal, at least one (1) of which involves a Superintendent search.

**Not Advantageous:** The Proposer includes three (3) or fewer samples of advertisements, brochures, and other forms of candidate outreach with the proposal, none of which involve a Superintendent search.

**Unacceptable:** The Proposer does not include samples of advertisements, brochures or other forms of candidate outreach.

#### **4. Evaluation of Interview Presentation**

The Superintendent Search Process Subcommittee and/or the School Committee may schedule interviews with any Proposer. Interviews will be ranked as follows:

**Highly Advantageous:** Proposer for this project was present, clearly stated a plan of action, demonstrated excellent communications skills, presented other personnel with experience and skills who will be assigned for the duration of this project, demonstrated awareness and understanding of the goals and objectives of the Arlington Public Schools, and successfully responded to all questions from the Superintendent Search Process Subcommittee and/or the School Committee.

**Advantageous:** Proposer for this project was present, outlined a plan of action, demonstrated excellent communication skills, presented other personnel with experience and skills who will be assigned for the duration of this project, demonstrated awareness and understanding of the goals and objectives of the Public Schools of Arlington, and successfully responded to most of the questions from the Superintendent Search Process Subcommittee and/or the School Committee .

**Not Advantageous:** Proposer for this project was present but did not present a plan of action, or was unable to communicate effectively, or presented other personnel who did not have the experience and skills to work on the project, did not demonstrate awareness and understanding of the goals and objectives of the Public Schools of Arlington, and/or would not be assigned for the duration of this project or did not successfully respond to questions from the Superintendent Search Process Subcommittee and/or the School Committee .

**Unacceptable:** Proposer for this project was not present and did not present a plan of action,

or was unable to communicate effectively, or presented other personnel who did not have the experience and skills to work on the project, demonstrated awareness and understanding of the goals and objectives of the Public Schools of Arlington, and/or would not be assigned for the duration of this project or did not successfully respond to questions from the Superintendent Search Process Subcommittee and/or the School Committee .

## **5. Presentation:**

**Highly Advantageous:** The Proposer's presentation was clear, well organized and demonstrated both effective communication skills and an understanding of the particular needs of the Arlington Public Schools community.

**Advantageous:** The Proposer's presentation was clear, well organized and demonstrated effective and sensitive communication skills.

**Not Advantageous:** The Proposer's presentation was disorganized or did not demonstrate effective communication skills.

**Unacceptable:** The Proposer's presentation demonstrated a clear lack of communication skills.



---

**Town of Arlington, Massachusetts**

**Adjourn**



## **Town of Arlington, Massachusetts**

---

**Submitted By: Paul Schlichtman, Chair of the Superintendent Seach Subcommittee**